



OnePath

User Guide for Advisers - 2011

Helpdesk

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1300 724 632 – business hours (EST)

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Table of Contents

Introduction.....	3
Logging In	4
How to place an order.....	9
Creating a Favourite List Template	18
Search Order History.....	20
Helpful Contacts.....	24
Frequently Asked Questions.....	25

Introduction

Welcome to OnePath's online ordering solution. StreamDIRECT is provided by Stream Solutions, OnePath's print management partner.

The system is entirely web-based and requires no loading of special programmes on your computer. The system will allow you to:

- Place online orders easily
- View a thumbnail of the products
- Download and print PDFs of printed products
- View the status of your orders
- Create templates of your favourite lists

Like anything new, there is an initial familiarisation period as you get to know the software and explore its features. We appreciate this and have provided a range of support functions outside this manual.

Accompanying this User Manual is a comprehensive Frequently Asked Questions (FAQs). If you have questions about using the system, please check the FAQs first to see whether your question is answered here.

If you have further enquiries please call the Helpdesk team on 1300 724 632 where a Stream Solutions consultant will assist you, or email your enquiry to StreamDirectHelpdesk@stream.net.au

Minimum requirements

Reasonable speed internet access
Internet Explorer 6 or greater
Browser configured to enable session cookies

About this manual

This manual is as much a tutorial as a reference guide. While many functions are intuitive, we highly recommend that you read this manual, as it should take no more than 10 minutes.

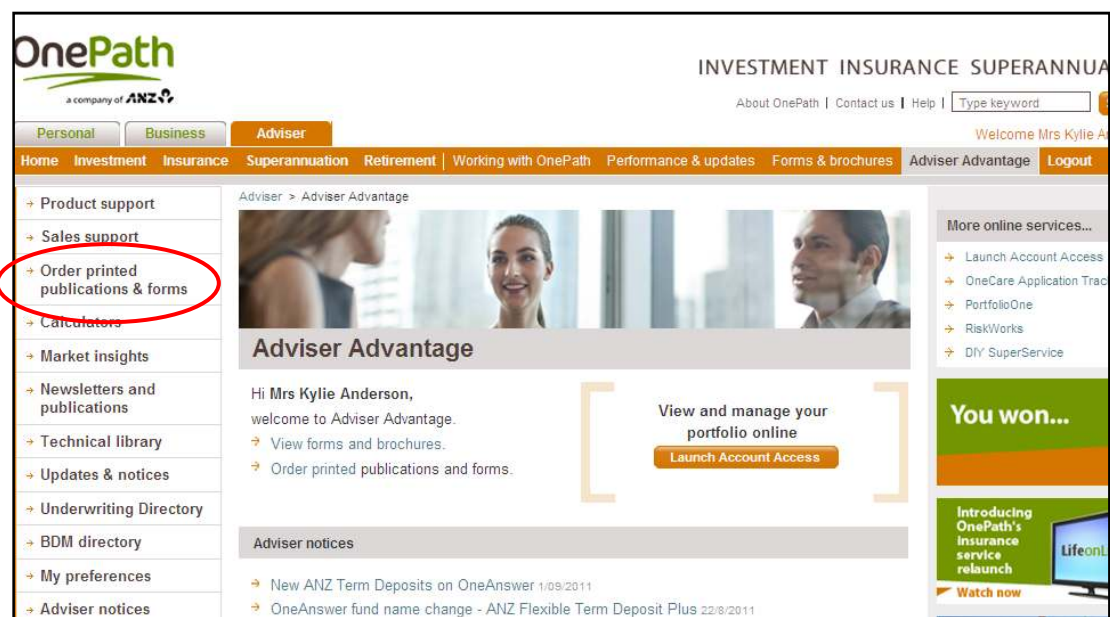
It contains a step-by-step guide on how to login and place an order.

Logging In

Step 1

Open your internet browser and log into the Adviser Advantage site located within onepath.com.au and follow the “Order print publications and forms” link.

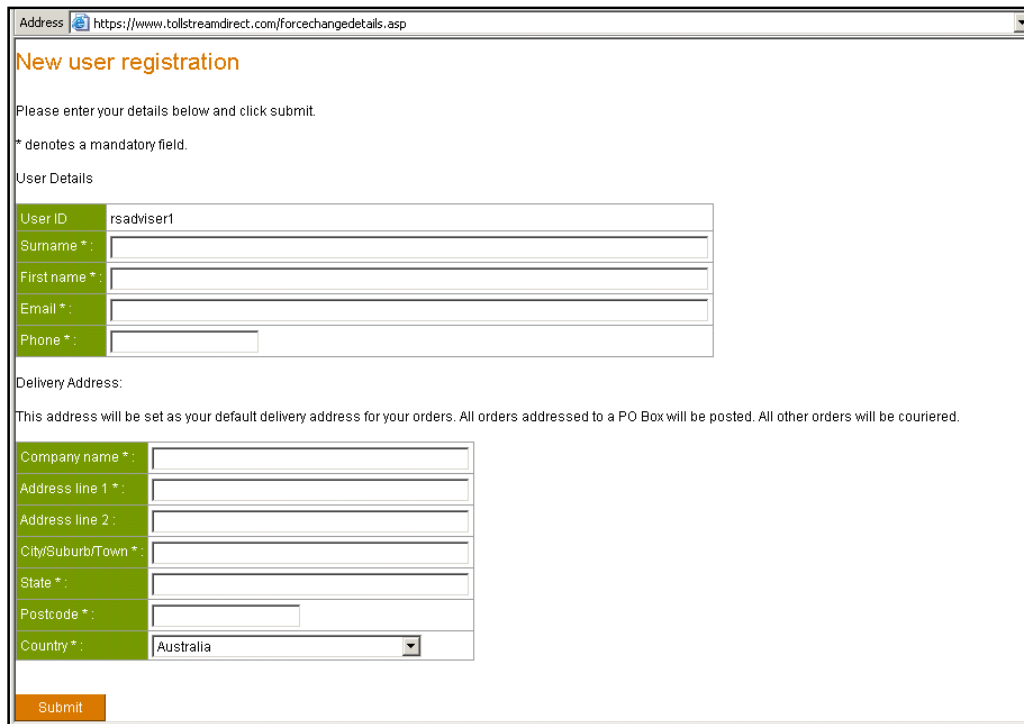
This is the site where you can order all forms, marketing and sales materials.




Step 2

Clicking the “Order printed publications and forms” link will take you directly to the StreamDIRECT site, and on your first visit to the site you will be presented with the following registration page. Please fill in all your details as required and click on submit.

The registration page will not appear again after your first login experience.



Address  <https://www.tollstreamdirect.com/forcechangedetails.asp>

New user registration

Please enter your details below and click submit.


* denotes a mandatory field.

User Details

User ID	rsadviser1
Surname *	<input type="text"/>
First name *	<input type="text"/>
Email *	<input type="text"/>
Phone *	<input type="text"/>

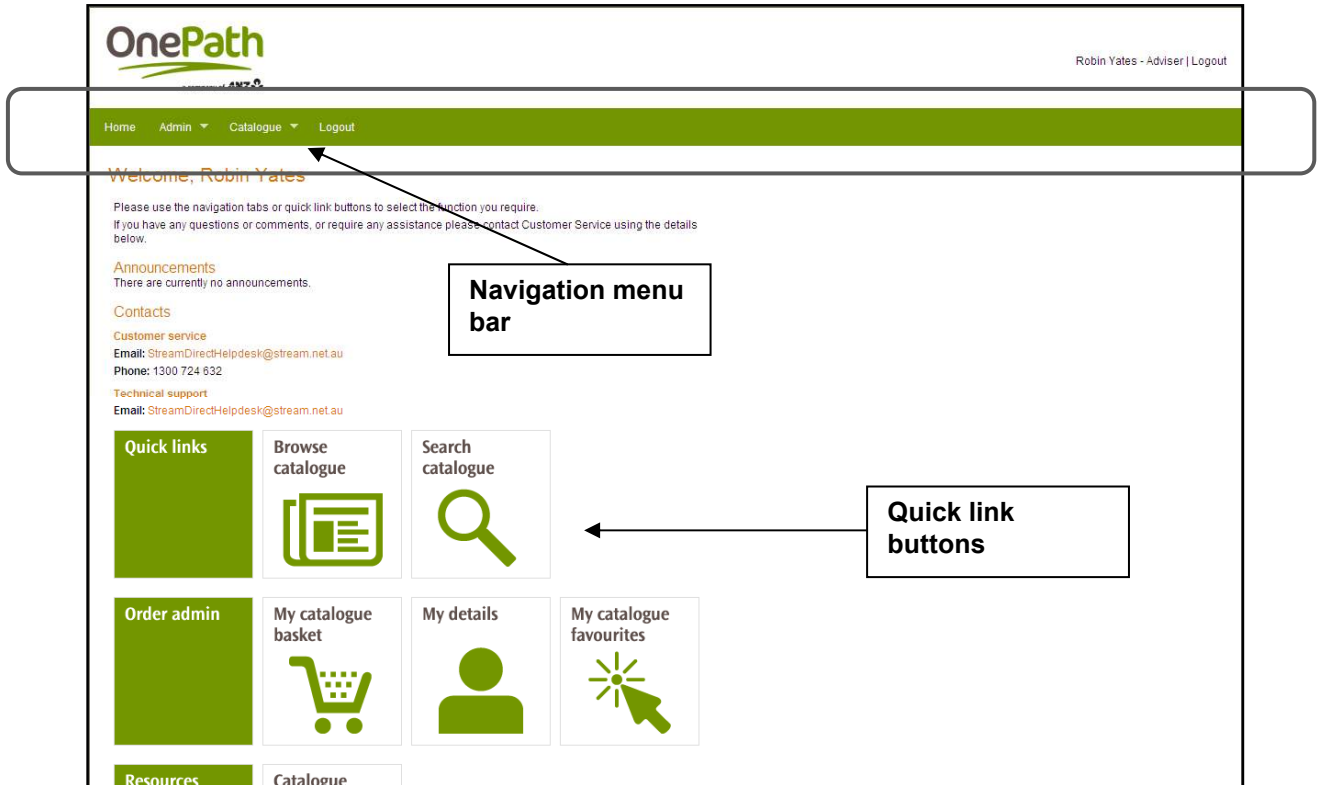
Delivery Address:

This address will be set as your default delivery address for your orders. All orders addressed to a PO Box will be posted. All other orders will be couriered.

Company name *	<input type="text"/>
Address line 1 *	<input type="text"/>
Address line 2 *	<input type="text"/>
City/Suburb/Town *	<input type="text"/>
State *	<input type="text"/>
Postcode *	<input type="text"/>
Country *	Australia 

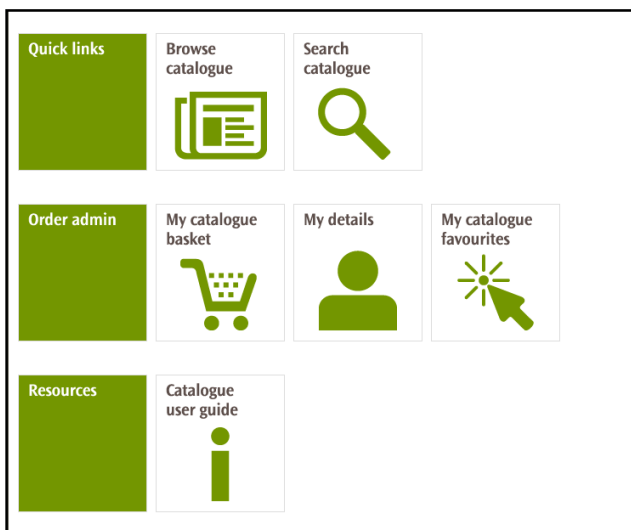
Step 3

After submitting the registration form you will be forwarded to the Welcome page. This page is made up as below:



Quick link buttons

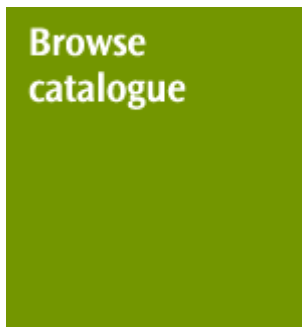
The Quick link buttons allow you to go directly to the functionality you require on a regular basis without having to find them through the navigation bar menu.



Quick link functionalities:

Browse Catalogue

Click to browse and order products from the online catalogue. This button will direct you to your available catalogue so you can locate your desired products. This is done via a browse tool similar to Windows Explorer.



Search catalogue

Click to search and order products from the online catalogue. This button will allow you to search for a product by your defined search criteria.



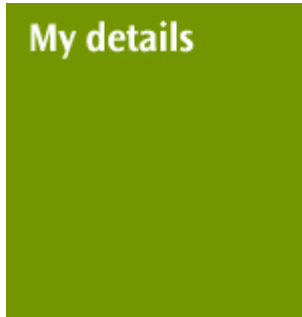
My catalogue basket

Access your current catalogue order. This button will allow you to view a list of your saved orders that have not been proceeded to check out.



My details

Click to access and change your personal details. This button takes you to My details screen and allows you to change your details such as contact details.



Catalogue favourites

Click to access your favourite list templates. This button will take you to your pre-saved list of favourite orders, which you can easily duplicate or amend as required.



Catalogue user guide

Click to access this user guide.

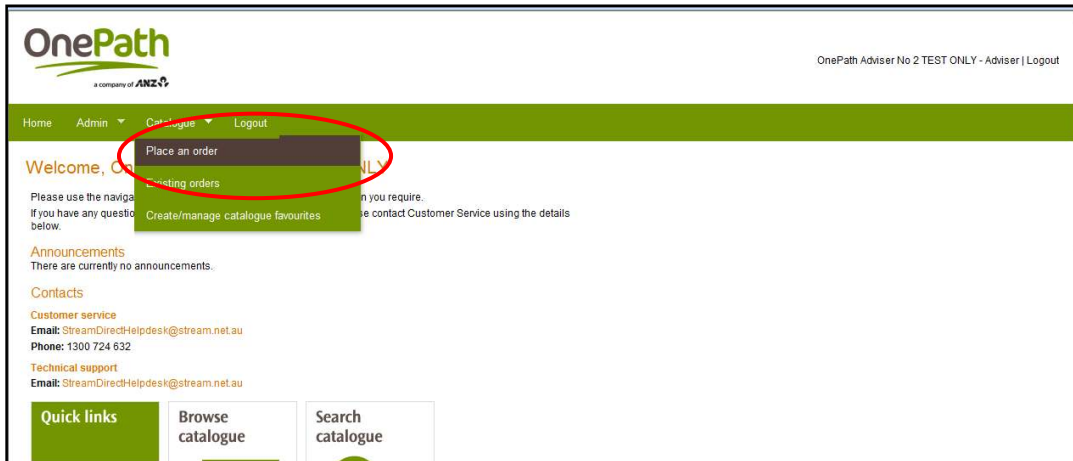


How to place an order

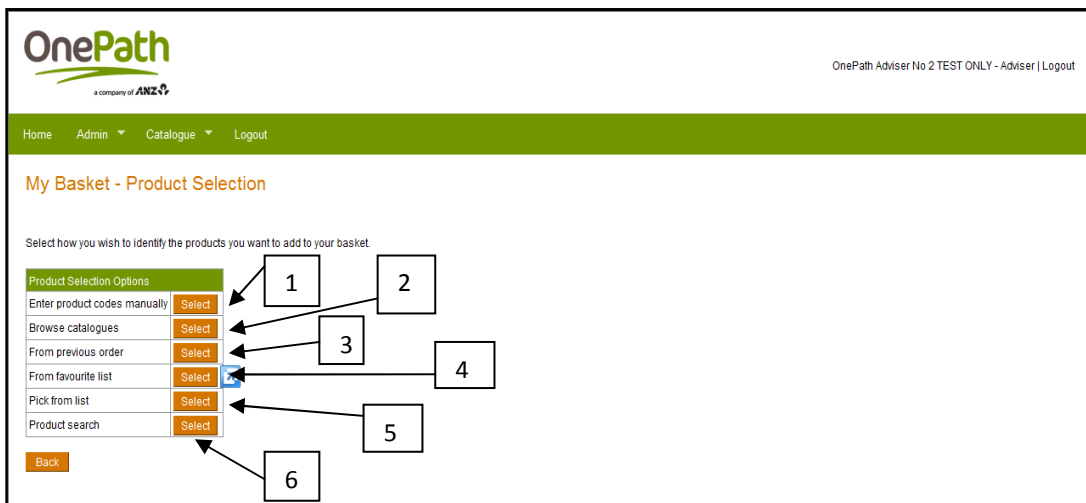
You can access the products that you wish to order in various ways. The following pages will take you through the options you have so you can decide which option suits you best.

Navigation menu bar

1. Select Catalogue tab from your navigation menu
2. From the drop down menu click on Place an order



You will be taken to the My Basket - Product Selection screen where you can search products from a list of different search options.



1. Enter product codes manually – this search option is useful if you wish to search for products using an exact list of product codes.

NB – The Product search option is an easier way to find products based on your search criteria.

2. Browse catalogue – this search option allows you to browse the catalogue to find the product you wish to order

3. From previous order – this option allows you to select products from a previous order

4. **From favourite list** – this option allows you to select products from your favourite templates

5. **Pick from list** – this option allows you to select products listed in alphabetical/numerical order

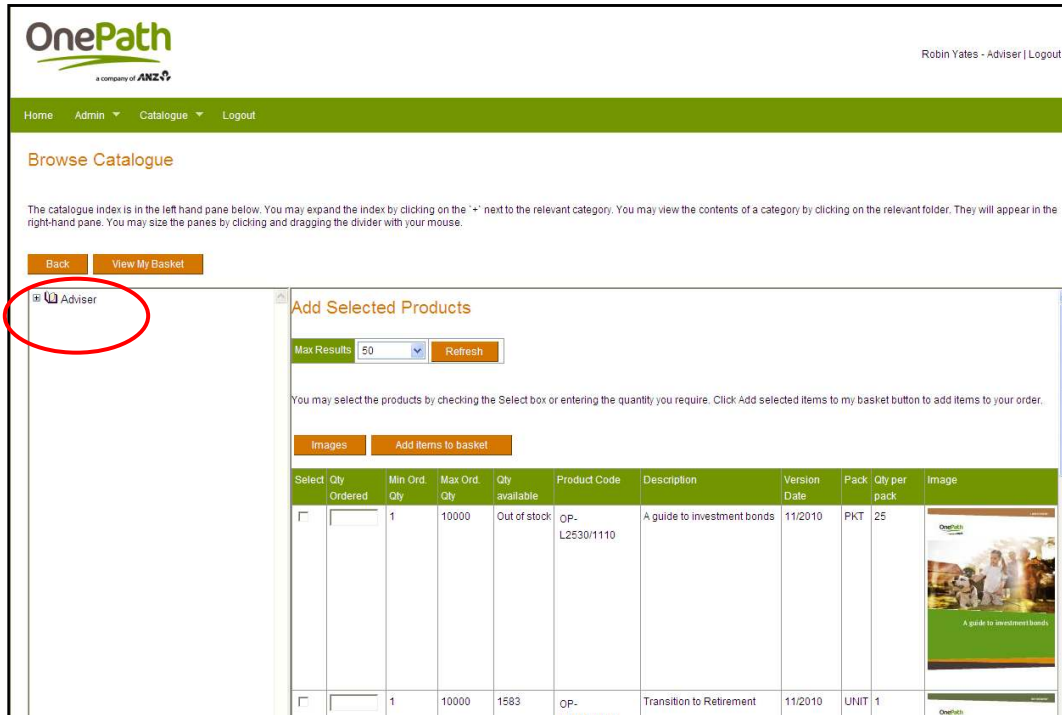
6. **Product search** – this option allows you to search products based on a part of the product code or description

You can place your order by searching for products as shown above or by using the relevant Quick link buttons.

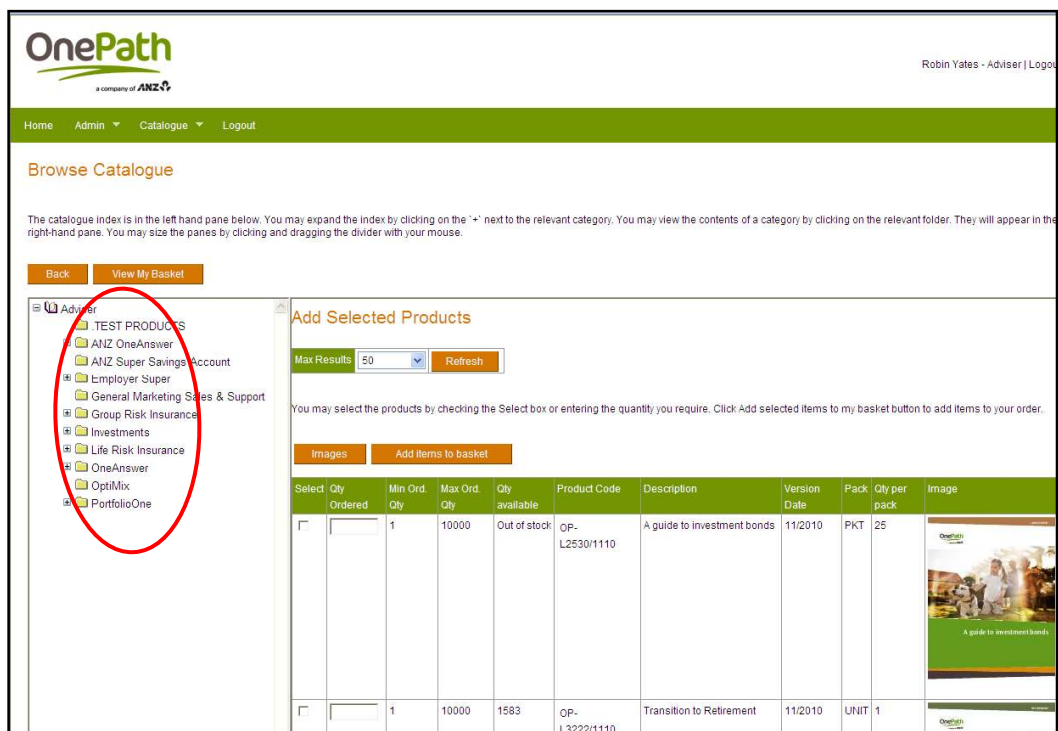


Browse Catalogue

Click on the adviser folder icon on the left hand side of the screen (highlighted below) to expand the folder which will open the catalogue.



The folder will expand to show a list of categories with sub-group folders.



- Any folder that has + beside them can be expanded further to display the contents within the category. The products will appear on the right hand pane as shown below.

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Home Admin Catalogue Logout

Browse Catalogue

The catalogue index is in the left hand pane below. You may expand the index by clicking on the '+' next to the relevant category. You may view the contents of a category by clicking on the relevant folder. They will appear in the right-hand pane. You may size the panes by clicking and dragging the divider with your mouse.

Back View My Basket

Adviser

- TEST PRODUCTS
 - ANZ OneAnswer
 - Investment Portfolio
 - Pension
 - Personal Super
 - ANZ Super Savings Account
 - Employer Super
 - ANZ Super Advantage
 - Corporate Super
 - Integra Super
 - General Marketing Sales & Support
 - Group Risk Insurance
 - Forms
 - Group Life
 - Group Salary Continuance
 - MasterTrust
 - Investments
 - Life Risk Insurance
 - OneAnswer
 - OptiMix
 - PortfolioOne

Add Selected Products

Max Results: 50 Refresh

You may select the products by checking the Select box or entering the quantity you require. Click Add selected items to my basket button to add items to your order.

Images Add items to basket

Select	Qty Ordered	Min Ord Qty	Max Ord Qty	Qty available	Product Code	Description	Version Date	Pack	Qty per pack	Image
<input type="checkbox"/>		1	10000	Out of stock	OP-L2530/1110	A guide to investment bonds	11/2010	PKT	25	
<input type="checkbox"/>		1	10000	1583	OP-L3222/1110	Transition to Retirement	11/2010	UNIT	1	

Note: Documents that are ANZ branded or have ANZ application forms have **(A)** in the product code

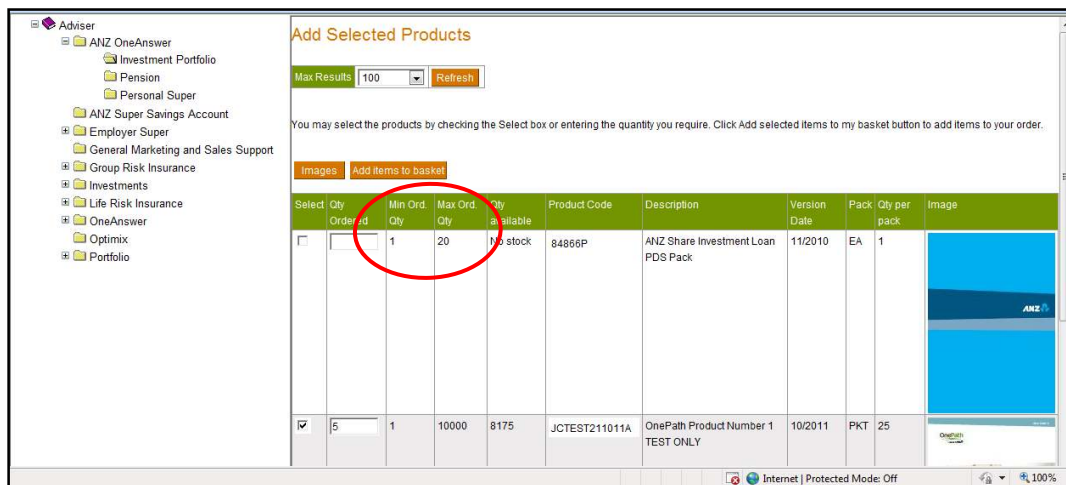
Please note that ANZ Advisers who require the OnePath OneAnswer branded PDS, these versions can be found under the ANZ OneAnswer folder. Click on “Investment Portfolio” or “Personal Super” for the version that you require. You will note that the extra description provides instructions that these documents are for ANZ Advisers only.

You can proceed to place your order as below:

1. When you click on the product folder that you wish to browse, the products in this group will appear in the main body of the screen. The products will be displayed with the following:

Select	Qty Ordered	Min Ord. Qty	Max Ord. Qty	Qty available	Product Code	Description	Version Date	Pack	Qty per pack	Image
--------	-------------	--------------	--------------	---------------	--------------	-------------	--------------	------	--------------	-------

2. Once you have located your required item/s, enter the quantity in the Qty ordered field provided. Please note this amount cannot be more than the Max Order Quantity or less than the Min Order Quantity.





Add Selected Products

Max Results: 100 Refresh

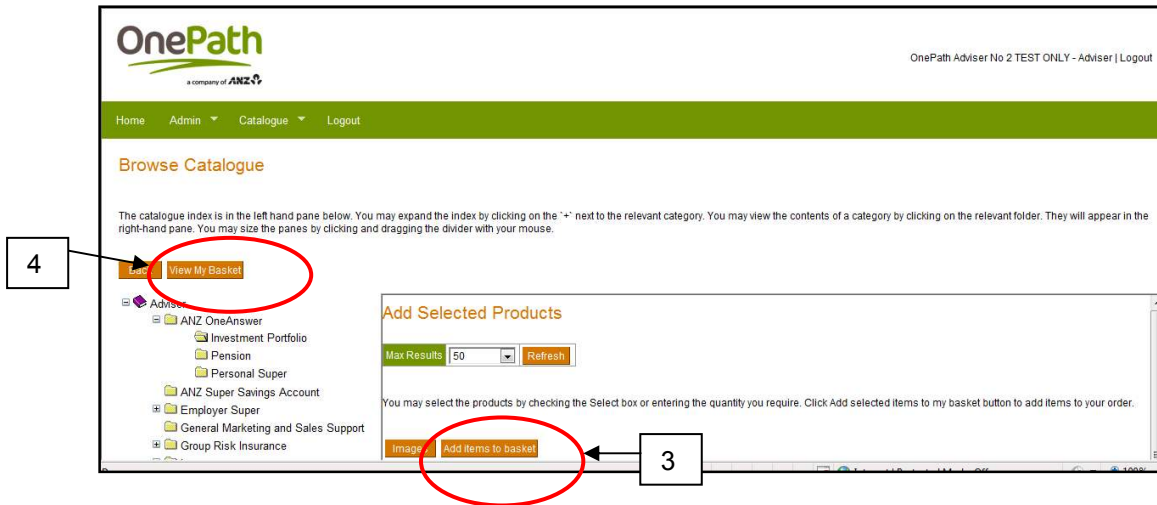
You may select the products by checking the Select box or entering the quantity you require. Click Add selected items to my basket button to add items to your order.

Images Add items to basket

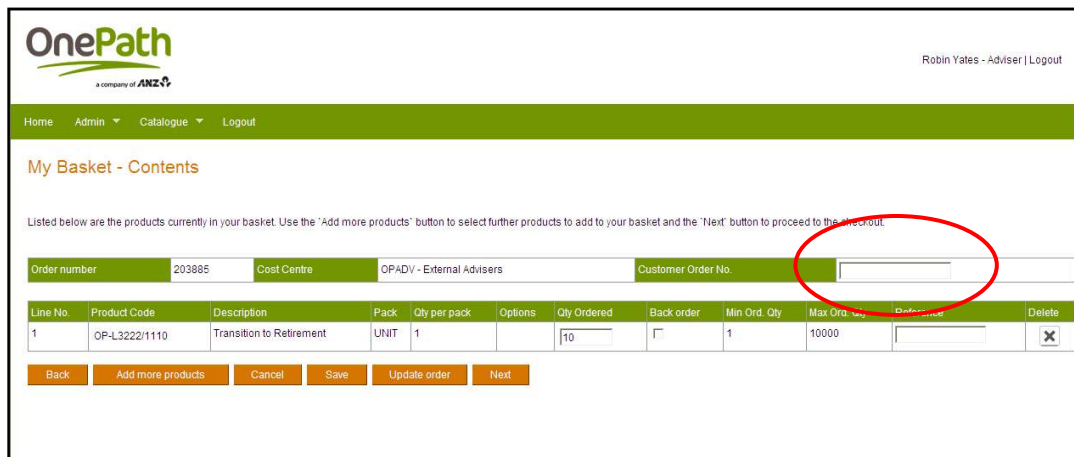
Select	Qty Ordered	Min Ord. Qty	Max Ord. Qty	Qty available	Product Code	Description	Version Date	Pack	Qty per pack	Image
<input type="checkbox"/>		1	20	15 stock	84866P	ANZ Share Investment Loan PDS Pack	11/2010	EA	1	
<input checked="" type="checkbox"/>	5	1	10000	8175	JCTEST211011A	OnePath Product Number 1 TEST ONLY	10/2011	PKT	25	

Internet | Protected Mode: Off

3. Select "Add to my Basket". Repeat until all required items have been selected. You can enter quantities on more than one product on the page and then add to your basket.



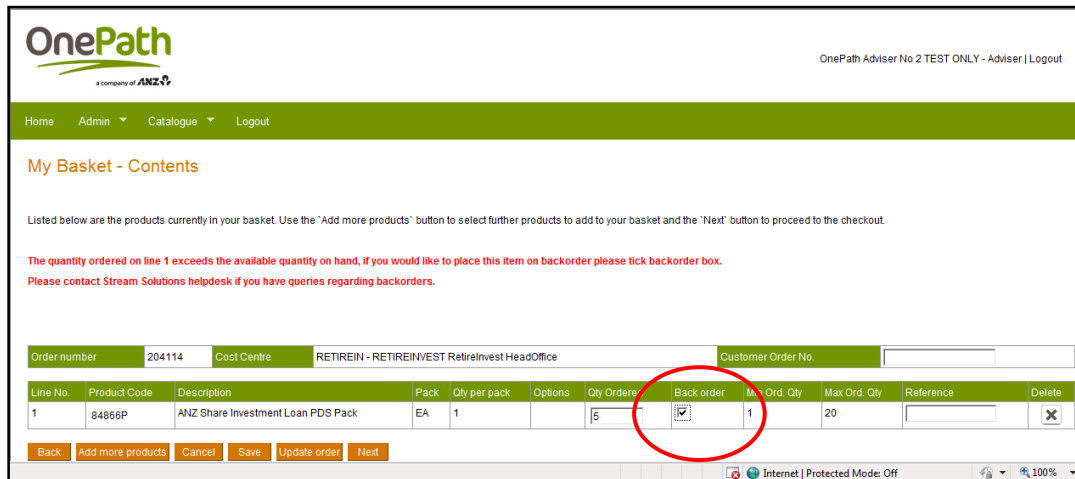
4. Once completed select "View My Basket". You will be forwarded to My basket – contents page, where you are able to view and change your order before it is submitted. You can also add a Customer Order number if you wish. This field can be used to capture a purchase order number, contact name or reference number that can be used to differentiate your orders. (see below)



Please note if you selected save, the below popup box will appear. Your order will be saved but the stock you have selected will be put back into the warehouse until you re-open the order for confirmation.



If you have ordered more items than is available in stock you have the option to put the item on backorder by ticking the backorder box (as below). The quantity of stock available will be despatched and when more of the stock arrives in the warehouse the balance of your order will be fulfilled. The packing slip will detail the quantity ordered versus quantity on backorder.



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Home Admin Catalogue Logout

My Basket - Contents

Listed below are the products currently in your basket. Use the 'Add more products' button to select further products to add to your basket and the 'Next' button to proceed to the checkout.

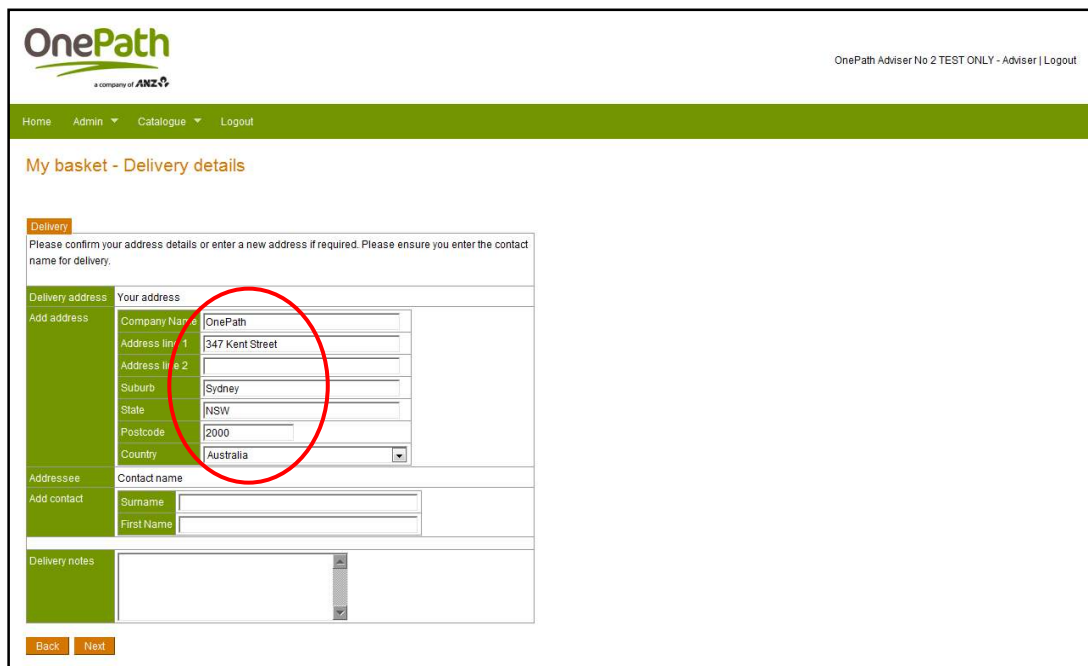
The quantity ordered on line 1 exceeds the available quantity on hand, if you would like to place this item on backorder please tick backorder box.
Please contact Stream Solutions helpdesk if you have queries regarding backorders.

Order number	204114	Cost Centre	RETIREIN - RETIREINVEST RetireInvest HeadOffice			Customer Order No.						
Line No.	Product Code	Description	Pack	Qty per pack	Options	Qty Ordered	Back order	Max Ord. Qty	Max Ord. Qty	Reference	Delete	
1	84866P	ANZ Share Investment Loan PDS Pack	EA	1		5	<input checked="" type="checkbox"/>	1	20		X	

Back Add more products Cancel Save Update order Next

Internet | Protected Mode: Off

- Once you are happy with your basket, click on Next to proceed to complete the necessary delivery details. You will note that the delivery address details that you submitted on the registration page at your first login will be displayed as your delivery address.



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My basket - Delivery details

Delivery

Please confirm your address details or enter a new address if required. Please ensure you enter the contact name for delivery.

Delivery address

Your address

Add address

Company Name OnePath

Address line 1 347 Kent Street

Address line 2

Suburb Sydney

State NSW

Postcode 2000

Country Australia

Addressee

Contact name

Add contact

Surname

First Name

Delivery notes

Back Next

6. You will need to enter the Contact name details of the person who will be receiving the goods.

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My basket - Delivery details

Delivery
Please confirm your address details or enter a new address if required. Please ensure you enter the contact name for delivery.

Delivery address Your address

Add address

Company Name	OnePath
Address line 1	347 Kent Street
Address line 2	
Suburb	Sydney
State	NSW
Postcode	2000
Country	Australia

Addressee Contact name

Add contact

Surname	Adviser
First Name	Financial

Delivery notes

Back Next

You can also enter a new delivery address if required along with the contact name details for your order.

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My basket - Delivery details

Delivery
Please confirm your address details or enter a new address if required. Please ensure you enter the contact name for delivery.

Delivery address Your address

Add address

Company Name	New Company name
Address line 1	New street address
Address line 2	
Suburb	new suburb
State	NSW
Postcode	2037
Country	Australia

Addressee Contact name

Add contact

Surname	Levin
First Name	Bob

Delivery notes

Back Next

- Once you have completed all the delivery details press next to proceed to the checkout. Please inspect the details and select Confirm Order button to complete the order and you will be forward to your order confirmation screen.

My Basket - Checkout

Please inspect the details below and use the Back button to alter the details or the Confirm Order button to complete the order.

Order number	204108	Cost Centre	RETIREIN - RETIREINVEST RetireInvestHeadOffice	Customer Order No.	
Delivery address	Financial Adviser Adviser Co 1 Level 2, Adviser Bldg 24 Charles St Sydney NSW 2000 Australia	Delivery notes		Invoice notes	

Message from webpage

Are you sure you wish to confirm this order?

OK Cancel

Line No.	Product Code	Description	Additional info	Pack	Qty per pack	Qty Ordered	Back order	Reference
1	JCTEST211011A	OnePath Product Number 1 TEST ONLY		PKT	25	4		

Back Cancel Save Confirm Order

- You will also be sent an email confirmation to the email address provided on your first time login registration page. The email will contain a pdf copy of your order summary. The order number displayed within the order summary is the reference used should you need to confirm any information regarding your order with the helpdesk team.

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Order Confirmation

Your order is now confirmed. If you have finished ordering, please logout or if you'd like to order more products, select the place new order button.
Below are your order confirmation details.
An email confirmation will also be sent.

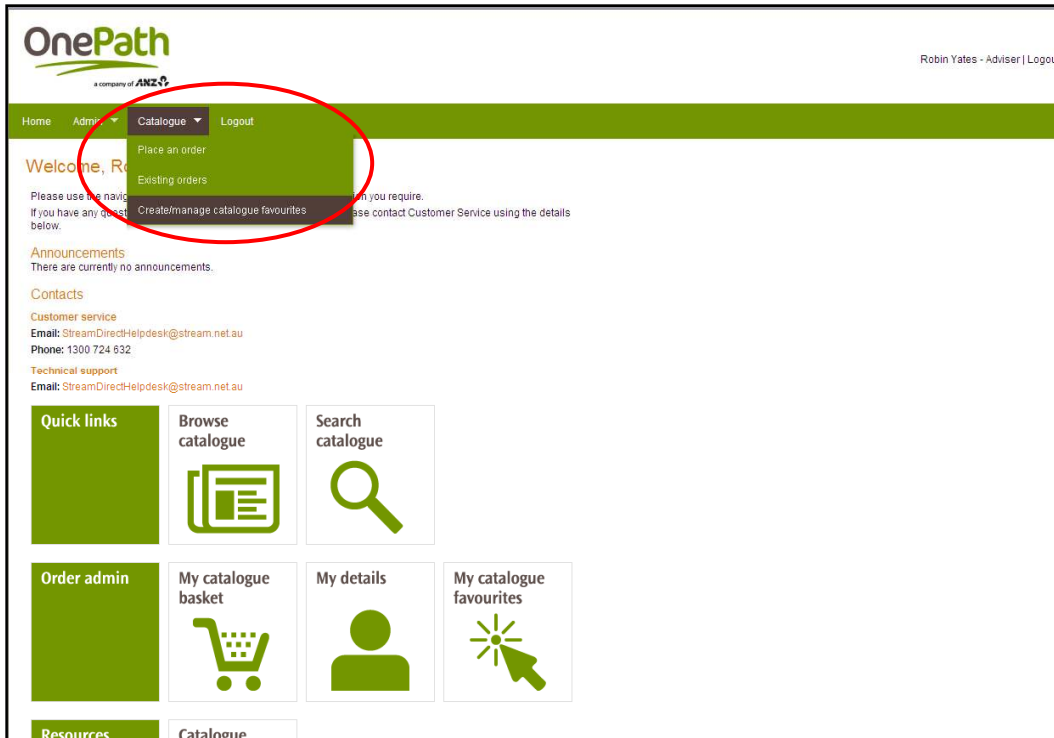
Order number	203885	Cost Centre	OPADV - External Advisers	Customer Order No.	
Delivery address	LifeStyle Financial Group PO Box 183 Launceston TAS 7250 Australia	Delivery notes		Invoice address	OnePath 347 Kent Street Sydney NSW 2000 Australia

Line No.	Product Code	Description	Additional info	Pack	Qty per pack	Cost Centre	Qty Ordered	Reference
1	OP-L3222/1110	Transition to Retirement		UNIT	1	OPADV	10	

Place new order Print

Creating a Favourite List Template

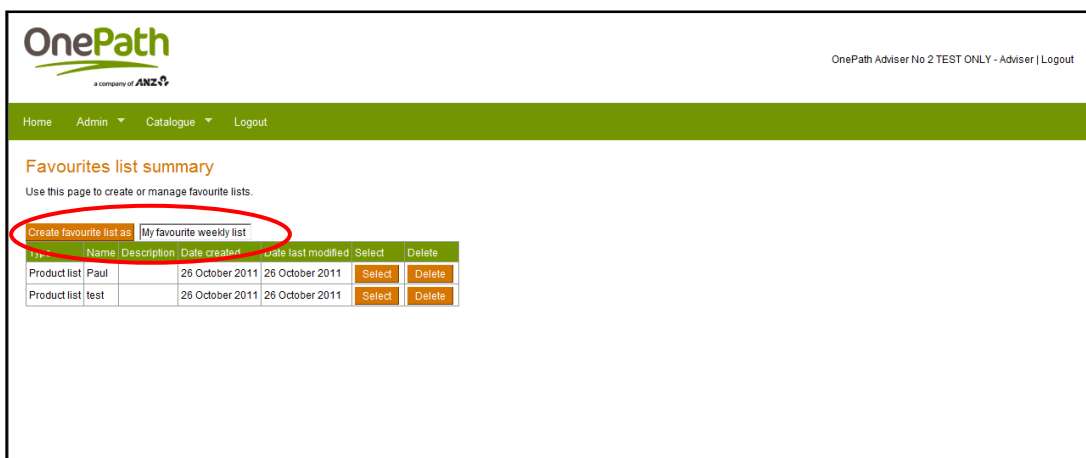
To create a new favourite order – Select the catalogue drop down list on the navigation bar and then select the Create/manage catalogue favourites.



If you have pre-saved list of favourite templates you will shown your favourite list summary. You can amend or delete a pre-existing favourite list template on this screen.

To add a new favourite order template:

1. Enter the name you wish to call it. Then select the “Create favourite list as” button.



- You are now required to choose the products you wish to add to your new favourite list. You can enter your search criteria or leave all fields blank and click search. Select the items you wish to add to your favourite list and click the “Add” button.

Home Admin Catalogue Logout

Product Selection

Please enter your search criteria below and then click search

Product codes beginning: Search

Product descriptions including: Search

Please enter product codes separated by spaces: Search

Result Limit: 50

Select All	Product number	Product description	Pack Type	Pack Size
<input type="checkbox"/>	A2157P	ASA Employer Guide PDS Pack	EA	1
<input type="checkbox"/>	A2269P	ASA Member Guide	EA	1
<input type="checkbox"/>	A2592P	ASA Welcome Kit includes welcome CD	EA	1
<input type="checkbox"/>	A2593	ASA Induction Brochure	EA	1
<input type="checkbox"/>	A2594	ASA Changing Jobs Brochure	EA	1
<input type="checkbox"/>	A2655	ASA Member Form	EA	1

Back Add

- Once you are happy with your new favourite list select save and your new favourite list will be available for use.

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Favourite List Details

Name: Favourite weekly

Description: Weekly order template

Product	Description	Pack type	Pack size	
JCTEST211011A	OnePath Product Number 1 TEST ONLY	PKT	25	Delete
JCTEST211011B	OnePath Product Number 2 TEST ONLY	EA	1	Delete

Back Add Products Save Save As

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Favourites list summary

Use this page to create or manage favourite lists.

Create favourite list as:

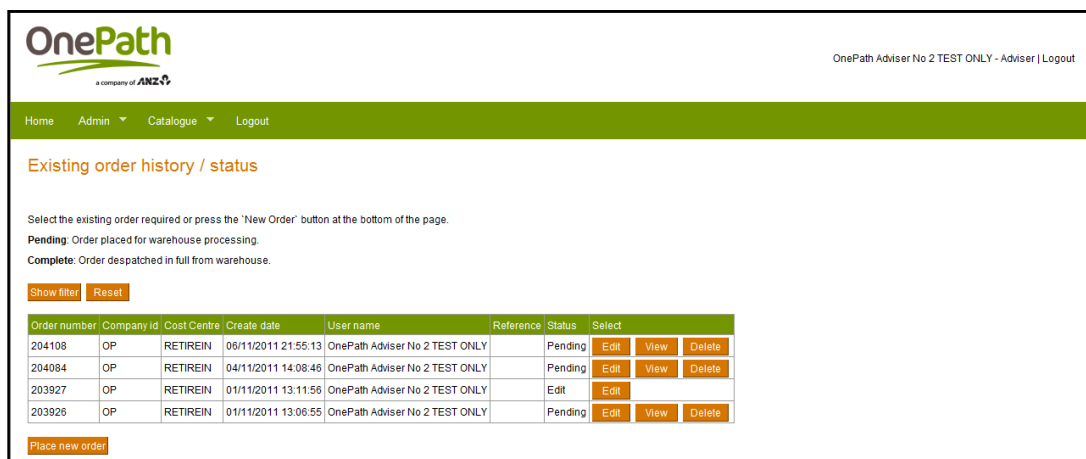
Type	Name	Description	Date created	Date last modified	Select	Delete
Product list	Favourite weekly	Weekly order template	06 November 2011	06 November 2011	Selected	Delete
Product list	Paul		26 October 2011	26 October 2011	Selected	Delete
Product list	test		26 October 2011	26 October 2011	Selected	Delete

Search Order History

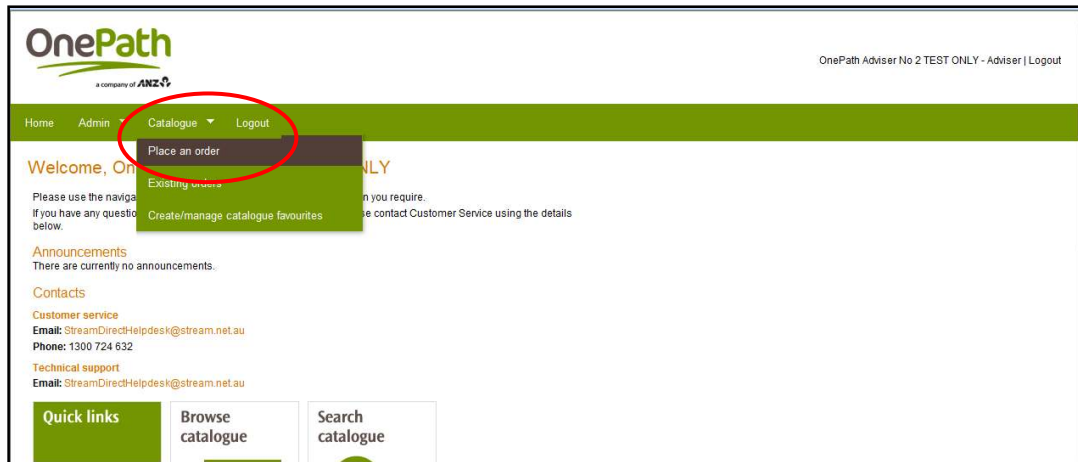
The existing orders functionality allows you to search all your previous orders to follow up on an order.



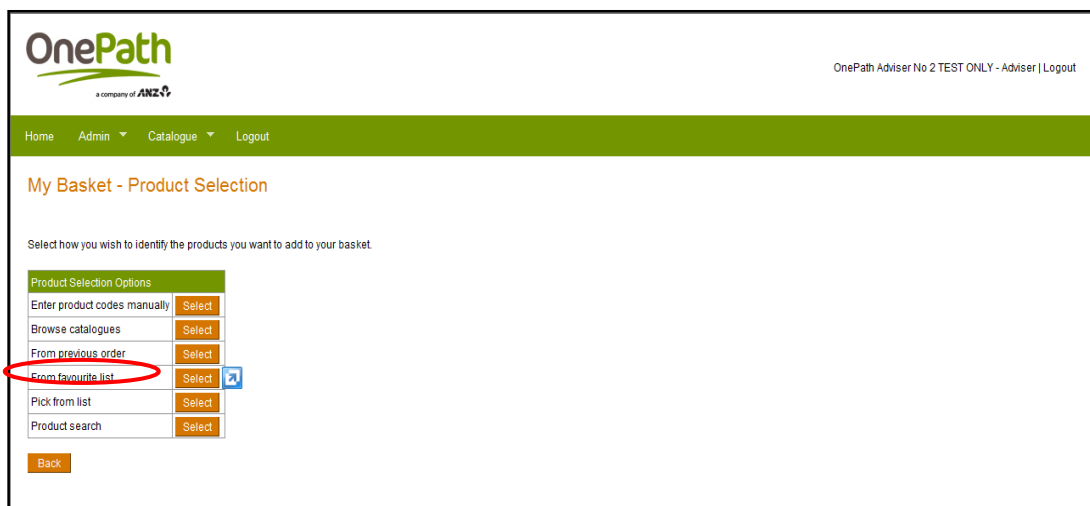
It also allows you to place a new order based on the details from a previous order instead of creating a new order from the beginning.



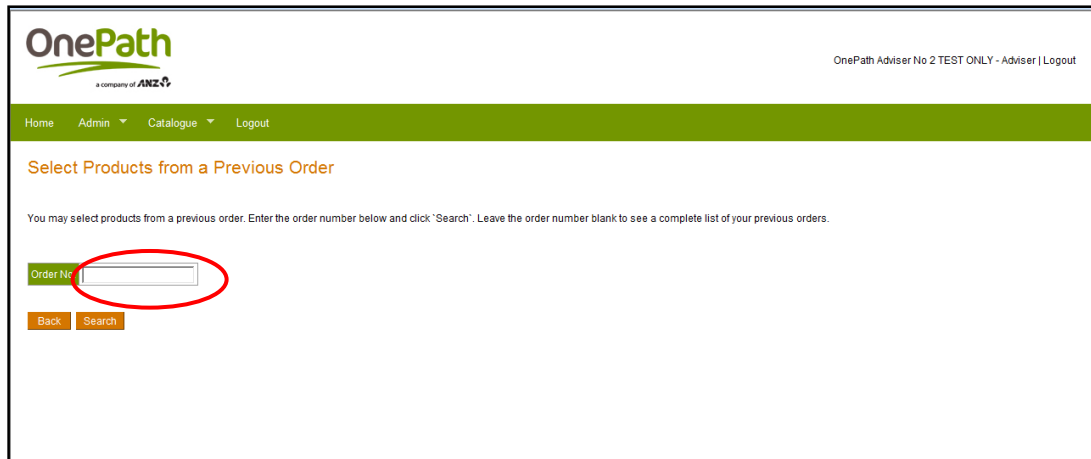
Step 1. Select Place an order option from the Catalogue drop down menu on the navigation bar.



Step 2. Select From previous order from the list below



Step 3. Click search to view your order history. Leave the order number field blank to see a complete list of your previous orders.



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Select Products from a Previous Order

You may select products from a previous order. Enter the order number below and click "Search". Leave the order number blank to see a complete list of your previous orders.

Order No

Back Search



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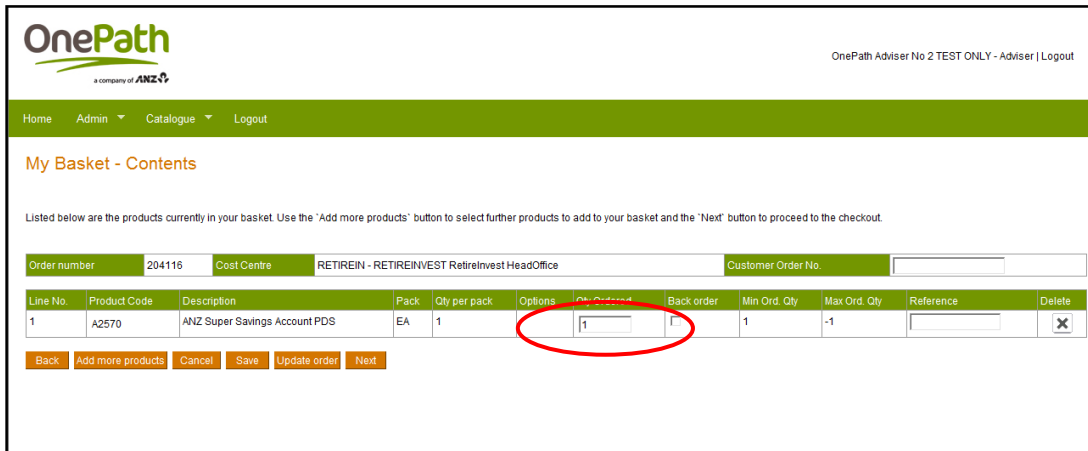
Select products from a previous order

Select the required order from the list below

Order number	Company id	Create date	Reference	Select
204108	OP	06/11/2011 21:55:13		Select
204084	OP	04/11/2011 14:08:46		Select
203927	OP	01/11/2011 13:11:56		Select
203926	OP	01/11/2011 13:06:55		Select

Back

Step 4. Select the order that you wish to replicate and you will be able to view the basket contents of your old order. At this stage you have the option to change the quantities or add more products.



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My Basket - Contents

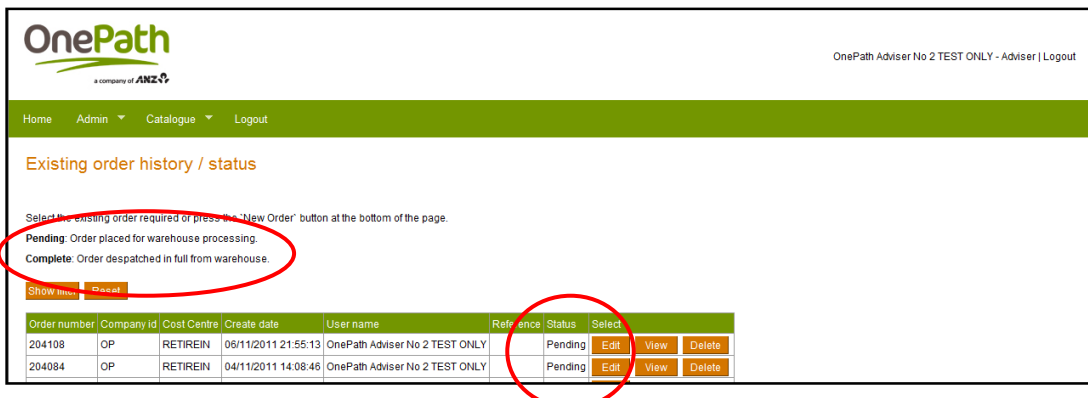
Listed below are the products currently in your basket. Use the 'Add more products' button to select further products to add to your basket and the 'Next' button to proceed to the checkout.

Order number: 204116 Cost Centre: RETIREIN - RETIREINVEST RetireInvest HeadOffice Customer Order No. [input field]

Line No.	Product Code	Description	Pack	Qty per pack	Options	Qty	Back order	Min Ord. Qty	Max Ord. Qty	Reference	Delete
1	A2570	ANZ Super Savings Account PDS	EA	1	[input field]	[input field]	[input field]	1	-1	[input field]	[X]

Back Add more products Cancel Save Update order Next

Step 5. You can proceed to complete your order as per the steps in the How to place an order section above. On completion of your order you will be sent an email confirmation. The status of your order will be updated automatically.



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Existing order history / status

Select the existing order required or press the 'New Order' button at the bottom of the page.

Pending: Order placed for warehouse processing.
Complete: Order despatched in full from warehouse.

Show items Repeat

Order number	Company id	Cost Centre	Create date	User name	Reference	Status	Select
204108	OP	RETIREIN	06/11/2011 21:55:13	OnePath Adviser No 2 TEST ONLY		Pending	Edit View Delete
204084	OP	RETIREIN	04/11/2011 14:08:46	OnePath Adviser No 2 TEST ONLY		Pending	Edit View Delete

Helpful Contacts

The StreamDirect helpdesk staff are available to help you with system navigation and delivery enquiries.

You can contact the helpdesk via:

- Email – StreamDirectHelpdesk@stream.net.au
- Phone - 1300 724 632 – business hours (EST)

Frequently Asked Questions

ORDERING STATIONERY AND SALES MATERIALS

1. How do I search for a product using a stock code?

Stock codes are unique identifiers that differentiate customer products from one another. Each code consists of 10-20 characters, and can be made of letters or numbers. e.g.: L2148/1110. When searching using a code, you can enter any part of the code in the StreamDirect Product search option which will return all closest matches. You are not required to enter a wildcard symbol if you are entering only part of a code.

2. If I don't have a code, can I search another way?

There are other search criteria that you can also use when searching for a stock item:

Description – you can enter part of the description (product name).

Keywords - search using key words (Some words may be abbreviated or shortened to fit the entire name of the stock item into the system.)

3. What is a Back Order?

When a stock item shows unavailable, there is no stock of that item in the warehouse.

Orders may still be placed against the item, and when the replenishment of stock arrives in the warehouse, the back-orders will then be fulfilled.

4. What quantities do I order?

When ordering stock items, the UNIT quantity may vary.

Each – means that you can order in single units. Box 250 – some items (eg: envelopes) come grouped, so ordering 1 = 1 x box of 250

5. How long will it take for my order to be delivered?

All orders placed before 1pm on a working day will be despatched by road freight the same business day, unless below table highlights the standard delivery timeframes across Australia otherwise agreed.

The table below highlights the standard delivery timeframes across Australia.

Destination	Delivery if order received prior to 1 pm	Delivery if order received after 12 pm & before 4 pm
NSW Country	Next Working Day	
Melbourne Metro	Next Working Day	1-2 Working Days
Victoria Country	2 Working Days	2-3 Days
Brisbane Metro	Next Working Day	2-3 Working Days
Qld Country	Working Days	
Adelaide Metro	2 Working Days	2-3 Working Days
SA Country	3 Working Days	
Perth Metro	5 Working Days (Deliveries only on Tuesday & Friday)	4-5 Working Days
WA Country	5 Working Days (Deliveries only on Tuesday & Friday)	5-6 Working days
Sydney Metro	Next Working Day	1-2 Working Days
Nthn Territory	5 Working Days	5 Working Days
Tasmania	4 Working Days	2-3 Working Days
ACT	Next Working Day	2-3 Working Days

Please note: the above delivery times are a guide only.

7. Can I view these products from the website?

Most of the products can be viewed online by clicking on the thumbnail preview.

8. How do I edit my basket/order or delete an item?

Items can be added to your basket by simply clicking the 'Add more products' button within a current order. Items can be removed from your basket by simply clicking the "X" button against the line of product that you wish to delete from your basket.

You can also change the quantity of items by changing the quantity and clicking "Update order" button.